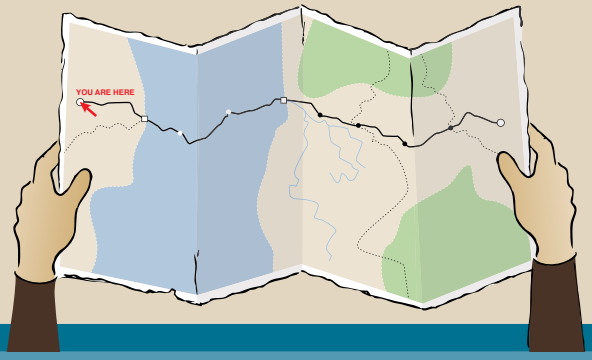
Are We There Yet?

A Communications Evaluation Guide

Your journey
to high-impact
communications
STARTS HERE



Prepared by Asibey Consulting for

THE COMMUNICATIONS NETWORK
strengthening the voice of philanthropy

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The Communications Network provides resources, guidance and leadership to advance the strategic practice of communications in philanthropy. For more information, or to download additional copies of *Are We There Yet?*, visit www.comnetwork.org.

Asibey Consulting develops communication and advocacy strategies and provides clients with the tools to measure their effectiveness. For more information, visit www.asibey.com.

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About This Guide

Who this guide is for

We designed this guide for philanthropic organizations and nonprofits that want to be more effective with their communications. Whether you are using communications to instill healthy nutrition habits in a community or promoting a national energy policy, an effective evaluation strategy can help you keep your communications on track and use your limited resources effectively.

In putting together this guide, we surveyed more than 80 experts in foundation and nonprofit communications, conducted 20 in-depth interviews and carried out an extensive review of existing resources and reports. Our research uncovered current practices in evaluating communications as well as the challenges faced by today's professionals. This guide offers solutions in an easy-to-use format, which you can adapt to the needs of your organization.

When to use this guide

This guide helps you gather input at the beginning of your activities to shape your communication strategy. It also gives you the tools to monitor progress and make corrections during implementation. It was not designed as a means for looking back on past work to determine if it was successful. Instead, the idea is to prepare up front and evaluate as you go along, so that you may adjust your tactics to ensure success.

This guide is an *evaluation strategy tool* – not a communication planning tool. It will be most useful for those who already have a communication plan in place with clear objectives, messages, strategies and tactics. However, even if you are still in the beginning stages of designing a communication plan, it is never too early to start thinking about evaluation. We've suggested a communication planning tool and other resources in the Appendix that may be helpful as a precursor or supplement to this guide.

How this guide works

This guide presents a step-by-step process for developing an *evaluation strategy*. After reading each section, you will be directed to the **Evaluation Strategy Worksheet** at the back of this guide, where you will complete the corresponding step. We recommend that you fill out each section of the worksheet as you go through the guide and, when possible, share your thoughts with colleagues for immediate feedback. After you've completed all the steps, you will have an evaluation strategy that you can begin implementing immediately.

Evaluating traditional and new media communications

Although the examples featured in this guide primarily reflect experiences with more established communications such as print, television and some forms of online communications, this approach is also applicable to evaluating social media such as blogs and social networking sites. In future versions of this guide, we will feature examples of social media evaluations as more foundations and nonprofits share their experiences using these tactics.

A Fundamental Distinction

COMMUNICATION VS. COMMUNICATIONS

The terms 'communication' and 'communications' are often used interchangeably, as if they have the same meaning. They do not.

Communication is the act of communicating. It is the exchange of thoughts, information and feelings between individuals or groups. It is the art and technique of expressing ideas effectively. Foundations and nonprofits use communication as a strategy to advance their missions.

Communications are the different methods used for communicating, such as person-to-person engagement, email, reports, and radio, television and web-based campaigns. It refers to the channels and messages used to communicate.

Throughout this guide, you will see both terms. See if you can make out the difference, and start employing the proper usage in your own communication (and communications)!

Why Evaluate Communications?

No one wants to travel a long distance, spend a lot of money and somehow end up in the wrong place. Evaluating your communications along the way can help you to stay on course and reach your destination.

Have you ever wondered if the money you spent on producing a report for policy-makers paid off? Or if your online strategy is helping you reach your audience(s)? Do your key constituencies perceive your organization the way you want them to? Evaluation can help you answer these questions and more.

"Our initial strategy to invest in high-quality publications has apparently paid off. We get critical feedback on our publications every year, and we look at what area we need to evaluate this year and make adjustments. For example, to produce content for our e-newsletter, we commissioned freelancers to write feature articles. We didn't get great feedback on those stories; our readers were more interested in the research we were publicizing than in the feature stories. So we cut back on the features, which were a heavy investment." —Susan O. Conner, former EVP for Impact Strategy, Lumina Foundation for Education

Evaluation improves the effectiveness of your communications

Developing a smart communication plan is an essential first step. But without a thoughtful evaluation strategy, you have no way of knowing if your plan is working or whether you need to make adjustments. Knowing the effect of your communication activities and fine-tuning those areas that need improvement will help you reach the outcomes you seek.

Evaluation can help you effectively engage with your audience

How do you identify and connect with your audiences and ensure that your messages are resonating with them? Evaluation is key. Baseline research conducted at the beginning will help you understand your audiences' priorities and values. Throughout implementation, evaluation can help you find ways to gather feedback from your audiences and learn how they are responding to your messages.

Situations change – strategies and tactics may need to change as well

In working to generate social change, you will inevitably face unexpected events, opportunities and threats that affect your work. Evaluation helps you collect valuable information at these critical moments so that you can make tactical and strategic adjustments. It can also help you determine whether your changes are putting you back on the path to success.

Evaluation helps you allocate resources wisely

All foundations and nonprofits work with limited human and financial resources. Evaluation can help determine whether your communication investments could be redistributed more effectively to achieve the desired results.

"We found out that we can do better in terms of clarity in communicating what we do and what we fund. We also found that there's an opportunity to be more customer service oriented. Like in business – you get a phone call later to see how the service was."
—Marc Fest, Director of Communications, John S. and James L. Knight Foundation

"Assessing communications goes well beyond assessing the formal communications; it is also about the one-on-one interactions with grantees."
—Kevin Bolduc, Vice President – Assessment Tools, Center for Effective Philanthropy

EVALUATION IN ACTION

Know How To Go

www.KnowHow2Go.org

"The hypothesis going into the Ad Council campaign was that we needed to create a campaign that would convince low-income kids in high school that they needed to go to college. We questioned if that was the right message and objective. The Ad Council subscribes to formative research at the beginning of any campaign. They did a nationwide survey of low-income families and found that over 90 percent actually already planned to go to college. So we saved what would have been $2M spent on that message and changed our direction.

"Subsequent focus groups with high school students and their households revealed the problem to be that they don't know *how* to go to college. They're not enrolling in freshman algebra, they're not taking the PSAT or SAT (and don't know what those are), they don't know how to find a suitable college, how to apply for college or how to apply for financial aid. They thought that if they got good grades in school and didn't get into trouble with the law, a letter would come in the mail one day inviting them to go to college and that it would be paid for. The adults said that they are supportive of their kids' dream to go to college, but they said they had no idea how to help them do it because they had never been to college. Therefore, it was up to the kids to figure out how to do it.

"Going in, we thought it would be a campaign directed at adults and how they would help their kids go to college, but, based on this research, the campaign had to be directed at kids."
—Susan O. Conner, former EVP for Impact Strategy, Lumina Foundation for Education

1 Determine What You Will Evaluate

Select your journey. Focusing on one site will make your trip much more manageable.

In this step, you need to identify exactly *what* you plan to evaluate. It is very difficult to evaluate every aspect of your work. If you have a comprehensive communication strategy, select the components that are most critical to its success. Or, you may choose to evaluate a tactic that your organization is using for the first time. You could also pick the area where you are making the biggest communication investments. The key is to keep the evaluation focused so that you can manage it alongside your other responsibilities and apply lessons learned to other areas.

"At the macro level, we choose some portion of our communications program to evaluate each year. Early on, we evaluated our web design. We will revisit that evaluation this year to measure the response to our redesign." —Susan O. Conner, former EVP for Impact Strategy, Lumina Foundation for Education

Here are some examples of what you could evaluate:

Strategic initiatives

- Communication initiative for behavior change
  Example: *Encouraging communities to recycle*
- Communication initiative for policy change
  Example: *Securing policymakers' support for safer landfills*
- Repositioning effort (organization decides to change focus or add a major program area)
  Example: *Growing from an organization that focuses only on reducing water pollution to one that focuses on reducing air pollution as well*
- Brand awareness (how key audiences perceive your organization)
  Example: *Earning the reputation of being the premier global warming think tank*

Tactical efforts

- Message dissemination (how well your messages are spread by the media or adopted by key audiences)
  Example: *Get your strategies for cleaner energy sources discussed on public radio*
- Media relations
  Examples: *Interaction with journalists, effectiveness of spokespeople, coverage in print and on television*
- Quality of communication exchanges with your audience
  Example: *Audience's satisfaction with direct communications with staff members*
- Print, video, online and new media communications
  Examples: *Newsletters, short documentaries, blogs, webinars*

This is not a comprehensive list, just some ideas to get you thinking. You should work with your communications team and colleagues in program development and administration to identify your evaluation priorities. To help you weigh your choices, keep in mind that the broader the scope of the evaluation, the more resource-intensive and time-consuming it will be to carry out.

Now go to the worksheet and enter the aspect of your communications that you will evaluate.

EVALUATION IN ACTION

The Wallace Foundation

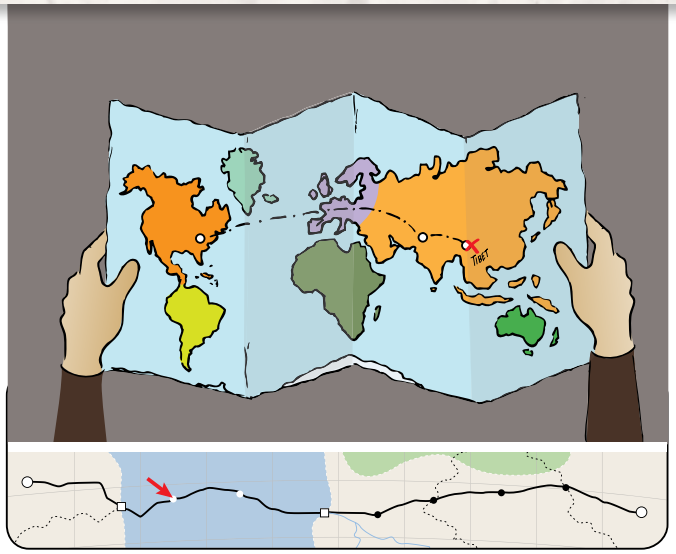
www.wallacefoundation.org

"As an example of front-end research, we conducted a survey that found that our audiences perceived The Wallace Foundation as being smart and knowing a lot – but that the knowledge wasn't always getting out. This was crucial information for our rebranding effort, because such efforts are most successful when they build on existing perceptions of strength and don't try to do the implausible. Using data on external perceptions of Wallace, and internal aspirations, we mapped out a brand identity focusing on knowledge that included a new look and a tagline.

"We carried this through our communications efforts, including our website, which we completely redesigned to foreground useful lessons for both grantees and non-grantees in such areas as strengthening leadership in public education, expanding arts participation and improving out-of-school-time programs for children. As a result of the research and marketing efforts, we have been able to lift our visitors from 50,000 to more than a million in a year while downloads have risen from several thousand a year to 100,000 per year." —Lucas B. Held, Director of Communications, The Wallace Foundation

2 Define Your Goal

Where is the finish line? State your ultimate destination to ensure an effective journey.



What do you want your communications to achieve in the long run? Goals represent the end aim of your effort. A goal is the ideal outcome – the improvement your organization strives to achieve in a community, region or sector. Goals are typically long term – five to ten years in scope – and should reflect your organization's mission and theory of change. Think of the big picture. Whether your communications are designed to support a goal for a specific program or a larger institutional goal, evaluation is essential to success. But first you need to clearly define the goal that your communication initiatives are supporting, as this will help you determine your evaluation approach.

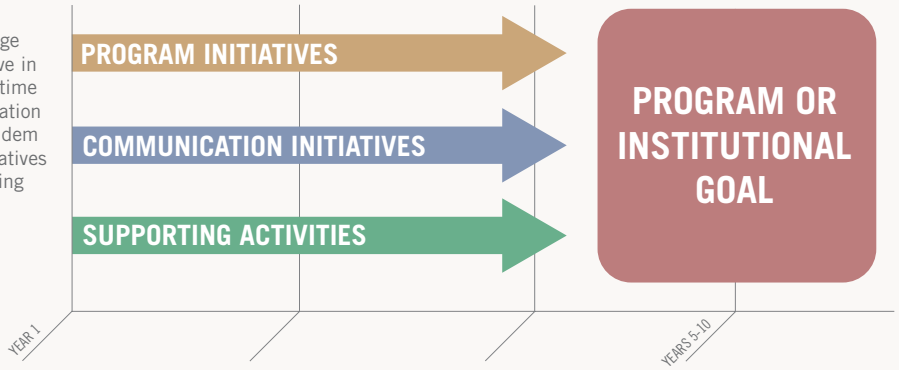


Figure 1.
A goal is the change you want to achieve in a five-to-ten-year time frame. Communication efforts work in tandem with program initiatives and other supporting activities to reach a goal.

"The central question to ask for any communication evaluation is quite simple: what contribution toward our program goals do we expect to gain from this communication effort, and how can we tell whether we are making progress? The planning, implementation and evaluation of a communication initiative can become quite elaborate, but it helps to stay focused on this core question."
—Jill Yegian, Director of Research and Evaluation, California HealthCare Foundation

Types of goals

Chances are there are several types of change that you are pursuing at once. Your organization may be working to generate broad social change, such as revamping a national healthcare system. Or you may be pursuing narrower goals, such as investing in a specific kind of medical research. The goals that organizations pursue are diverse, but most of them can be divided into two categories: "policy" goals and "behavior" goals. Your organization may be working toward both types of goals, as they can be complementary; or you may be focusing on one more than the other. We suggest that you review the list below and select the type of goal that your communications are contributing toward in the next five to ten years. It's okay if your goal is not within these categories; we have listed them to help get you thinking.

Policy Goals

In the public arena, the ultimate goal is usually a positive change in government policy, such as increasing funding for education. Some of these goals can take decades to achieve; others may be reached in a shorter time. For evaluation purposes, you should focus on the goal you hope to achieve in a five-to-ten-year period.

- **Awareness** The initial stage for most policy work is making people aware of an issue and why it matters. By raising awareness among key audiences, you lay the groundwork for long-term change. For example, to build support for stopping the genocide in Darfur, campaigners must start by educating the general public about the place and the conflict.

- **Champions/Supporters** Cultivating champions or supporters builds upon awareness to create strategic advocates for your issue. The aim is to identify and convince key individuals to fight for your cause and win over others. Such champions may be policymakers themselves or people in a position to influence them. Supporters of children's health insurance programs, for instance, look for state legislators who will speak out for their cause and convince peers to support favorable policies.

- **Constituency Building** Constituency building is about developing a broad-based network of supporters who can work together. These partners might be fellow nonprofits, segments of the general public or grassroots groups. For instance, the constituency for climate change brings together high school students, faith-based groups and even celebrities.

- **Public Will** Public will gives an issue a sense of urgency and makes change happen. Public will is what ensures that your issue grows in prominence and action is taken. After World War II, public will across the world paved the way for the emergence of international human rights standards.

- **Policy Change** Your ultimate goal – and the most difficult one to reach – is to change a policy. It can be attained, but typically not without the previous steps. So if your goal is to have the U.S. government significantly increase its funding for universal preschool, you first have to raise awareness, cultivate champions, build constituencies and foster public will.

Behavior Goals

Behavior goals reflect desired changes in the way people act in certain aspects of their lives. From eating habits to recycling, these are changes that are made at an individual level. And like policy goals, some of these changes may take a long time to be realized. For your evaluation, choose the goal that best describes what you expect to achieve in a five-to-ten-year period.

- **Awareness** As with a policy goal, your aim is to make the audience aware of your issue and why it matters. This is the first step in changing attitudes and behavior. Awareness is especially crucial when your audience has never heard about your issue, or if your core messages conflict with your audience's currently held beliefs.

- **Salience** It's not always enough for your audience to be aware of an issue. They have to believe in its importance. Salience refers to increasing the weight of your issue and creating a sense of urgency. For instance, people may be aware of the health risks associated with childhood obesity, but your organization must give those problems a higher level of visibility relative to other issues.

- **Attitudes/Beliefs** If your efforts to build awareness and salience are succeeding, you can start working to change the way your audience thinks about an issue. Say your organization aims to address global warming. Once you have raised awareness about climate change and demonstrated that it is a pressing problem, you may start to convince people that it is a real and urgent trend, and not merely a theory.

- **Self-Efficacy** This goal refers to an individual's belief about his or her own capabilities. For instance, your communication initiative could aim to reassure people living with diabetes that they are capable of effectively monitoring their sugar levels on their own.

- **Social Norms** This refers to the way a broad group of people think about what is the right kind of behavior. For example, it used to be common for people to smoke in airplanes, restaurants and public buildings. Today, that's considered unacceptable to a majority of people in the United States. This creates a supportive environment for banning smoking in public places.

- **Behavioral Intention** This reflects the willingness or intention of people to do things differently. For instance, when a person says, "From now on, I am going to practice safe sex," he or she is signaling that the message has been received and internalized.

- **Behavior Change** When people start behaving differently, you have reached your goal. For instance, as more and more children exercise regularly and make healthy nutritional choices, there will be a decrease in the percentage of overweight children – and the associated medical ailments – over time.

What if I am only interested in evaluating a communication tactic such as a newly created blog? Do I still need a long-term goal?

Yes, you do. This will put your communications and your evaluation in the context of what your organization is trying to achieve. As a result, you will be better able to analyze whether your tactics are helping you achieve that overarching goal.

What if my goal is simply to raise awareness about my organization, as opposed to a specific issue? Do I select 'awareness' as my goal?

Many communicators are tasked with this general goal. However, it may be more effective to think of 'awareness of an organization' as an *intermediate objective* on the path to achieving a larger goal. Ask yourself, "Why do I want people to know about my organization? What is the change my organization is pursuing over five to ten years?" That change is your goal.

Now go to the worksheet and write down the goal that best represents the change you want to achieve. Select only one goal; this is important to help you stay focused.

EVALUATION IN ACTION

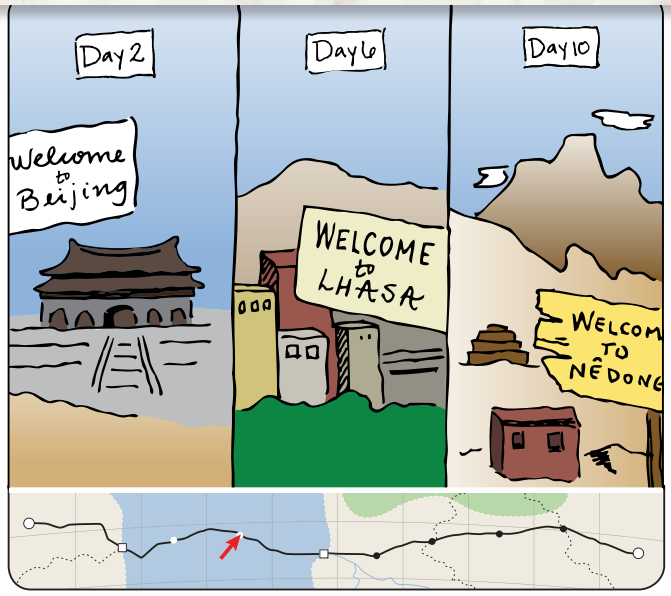
Cover the Uninsured

www.covertheuninsured.org

"[W]e've focused on increasing the salience and the political and economic unacceptability of 47+ million uninsured in America. For several years, we have mounted a series of Cover the Uninsured campaigns with our partners…and a group of sometimes strange bedfellows ranging from the U.S. Chamber of Commerce to the AFL-CIO. We have been working to help change the frame – the perceptive boundary – in which the public, opinion leaders and policymakers know and understand who the uninsured are, and thus increase the salience of who they are and the propensity of policymakers to act. We've done market research, conducted polls and focus groups, tested and re-tested messages, done pre- and post-campaign analyses. Since beginning these campaigns, the dominant frame has changed. The research tells us that the public no longer sees the uninsured as the downtrodden looking for a handout, but rather people like us – 80 percent of them parents and kids in working families, your close relatives, your neighbors and friends – who aren't uninsured by choice, but because they or their employer can't afford it." —David Morse, Vice President for Communications, The Robert Wood Johnson Foundation, from "Musings on Measurement" in *The Firm Voice*, June 18, 2008.

3 State Your Objective

Map your route: where do you want to be at the end of each leg?



Now that you have established what aspect of your communications you want to evaluate as well as your goal, the next step is to define your objective. Objectives are different from goals: they are more specific and have a shorter time frame, typically one to two years. Think of objectives as a series of benchmarks on the way to your goal. Most likely, you will have a few intermediate objectives that will progressively lead to your goal.

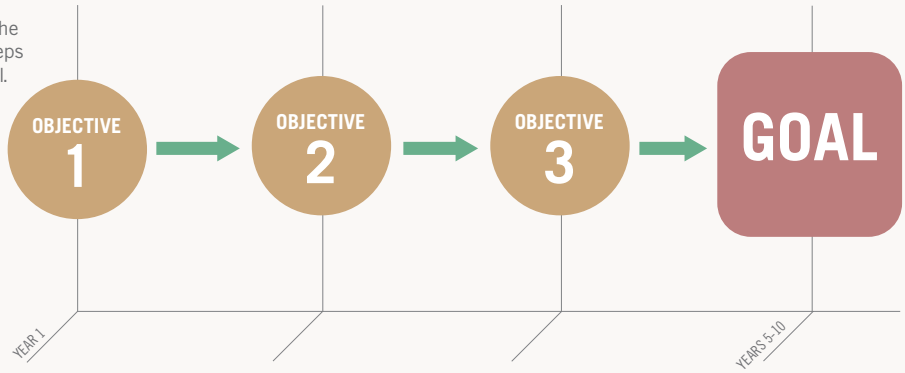


Figure 2.
Objectives are the intermediate steps toward your goal.

Well-defined objectives are crucial to guiding your communications evaluation. If you are clear about what results you want to achieve in the short term, it will be easier to assess whether your communications are leading to your long-term goal.

Example of Goals and Objectives

Five-year Goal

Consumers in coastal states demand and purchase sustainable seafood on a regular basis.

Intermediate Objective 1:
By the end of year one, increase by 50 percent the presence of messages about sustainable seafood choices in media outlets in coastal states.

Intermediate Objective 2:
By the end of year two, double the constituency of advocates for sustainable seafood choices in coastal states.

Five-year Goal

Secure a decade's worth of new funding for children's education in the world's poorest countries.

Intermediate Objective 1:
By the end of year one, produce a report on the dire state of education in the world's poorest countries that will serve as a critical resource for policymakers, government agencies and education NGOs.

Intermediate Objective 2:
By the end of year two, secure public support of three members of Congress, who will put forward legislation to increase U.S. government funding for education in poor countries.

Is my Objective SMART?

A good objective should be SMART: Specific, Measurable, Attainable, Result-focused and Time-specific. Once you've come up with your objective, ask yourself, "Does this pass at least four of the five SMART criteria?" If not, it may be time to revise your objective. Let's take a look at the SMART scores for two of the preceding sample objectives.

OBJECTIVE	SPECIFIC	MEASURABLE	ATTAINABLE	RESULT-FOCUSED	TIME-SPECIFIC
By the end of year one, increase by 50 percent the presence of messages about sustainable seafood choices in media outlets in coastal states.	✓	✓	✓	✓	✓
By the end of year one, produce a report on the dire state of education in the world's poorest countries that will serve as a critical resource for policymakers, government agencies and education NGOs.	✓		✓	✓	✓

"If you have very clear objectives, whether they be for your communications or your program, then it's a lot easier to measure them. 'Change the world' objectives are very hard to measure. But it is not hard to measure one of our project objectives, which is to get 100 digital retinopathy cameras up and running across the state, and get 100,000 people screened." —Spencer Sherman, Director of Publishing and Communications, California HealthCare Foundation

We can easily see that the first objective passes all five criteria, provided you have baseline data against which to compare your efforts over time. On the other hand, the second objective only meets four of five criteria. It doesn't pass the "measurable" test because it does not define what is meant by "critical resource." To meet this criterion, we would have to assign a specific meaning to "critical resource." For instance, it could mean that the report contains the latest research data and expert consensus on an issue, and policymakers cite at least one of the report's findings in their public statements or on their websites.

Can I evaluate progress on several objectives at once?

The worksheet is designed to evaluate one objective at a time. This will help you stay focused. However, if you decide to evaluate multiple objectives at the same time, make copies of the worksheet and fill one out for each objective. Later on, you may select an evaluation technique (such as a survey) to gather data for assessing multiple objectives. (Step 8 will cover evaluation techniques.)

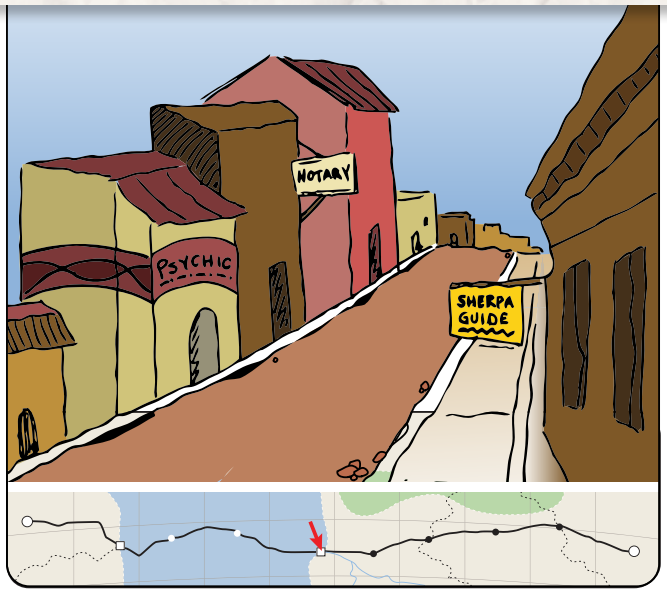
What's the best way to pick the objective I want to evaluate?

Your objective should directly address the program or institutional goal you are pursuing. Avoid objectives that focus solely on you and your team, like "develop a communications plan" or "launch a website." Always think in terms of your audience. Your objectives should be focused on the *results* you want to achieve with your audience on the way to your goal: advancing an issue with policymakers, changing people's attitudes, securing new funding streams from donors and so on.

Now go to the worksheet, write down your objective and run it through the SMART test. If it passes four of the five criteria, you're ready to move on.

4 Identify Your Audience

Who can help you find the information you are looking for? Where can you find them?



Now that you've articulated your desired goal and objective, you need to pinpoint the audience(s) that will be the focus of your evaluation. Organizations often measure what's easy to count, such as how many publications they have sent out or how many people have visited their website. However, most communications are ultimately trying to move an audience; therefore, getting feedback from the right source is crucial for a good evaluation.

Knowing which audiences to include in the evaluation will depend on your goal and objective. For instance, if you are evaluating an initiative to get people in your state to buy more sustainable seafood, you might concentrate on the individuals who make household purchasing decisions.

While the audience for your evaluation will likely be the same audience that you are targeting with your communication efforts, you may also evaluate additional audiences. For example, if your objective is to secure policymaker support for improving fisheries management, your audience may include seafood consumers in a particular district. These consumers' opinions and choices will likely affect the decisions of policymakers who represent them. Thus, your evaluation should include *both* your communications target audience (the seafood consumers) and the auxiliary evaluation audience (the policymakers responsible for fisheries management) to determine whether and how your communications are influencing these different players.

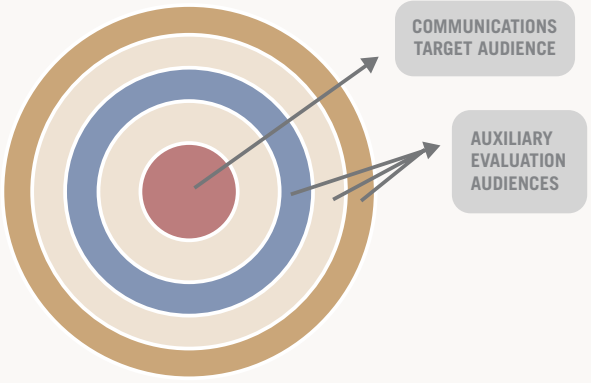


Figure 3.
The audience for your evaluation should include both the audience you targeted for your communication activities and any others who may influence your goals and outcomes.

Be specific when identifying your audience. Selecting 'policymakers,' the 'general public,' 'young people' or 'women' will not give you much insight into where your communications are effective – these categories are far too broad. Narrow your audience to a well-defined group: 'senior members of the Senate Foreign Relations Committee' or '25-to-34-year-old Hispanic professional women living in the Tri-state area.' The more narrowly you define your audience, the more effective your evaluation will be, as you will know exactly whom to call, survey, observe and solicit feedback from.

"The really critical need is for foundations to do a better job of researching their target audiences. Sounds like common sense, but evidently most foundations don't do this often and many don't do it at all. For example, a recent study found that few of the largest foundations do surveys of target readers of their annual reports, which can be pretty expensive communications investments. You'd think foundations would want to know whether they're getting a return on those investments." —Mark Sedway, Philanthropy Awareness Initiative

"I'll give you one example of how evaluation is having an impact in our work. We had to put together a list of the people we wanted to influence so they could be surveyed for a baseline Stakeholder Perception Report, a total of about 500 people. Just the act of doing that really focused my group's attention to who our primary audience is. This has helped to give us tremendous focus." —Spencer Sherman, Director of Publishing and Communications, California HealthCare Foundation

Now go to the worksheet and enter your audience(s) for the evaluation. Remember to consider the target audience of your communication activities as well as any auxiliary audiences that may inform your evaluation.

5 Establish Your Baseline

Think about the information you need to collect at the beginning of your journey that will help you assess progress along the way.

A baseline – the initial data that will serve as your starting point – is a must-have for a good evaluation. During implementation of your communication activities, you will be able to compare the baseline with new data gathered over time to assess progress, make course corrections and measure success. If you already have a baseline, this is a good time to revisit it and determine whether you need to broaden it to include more data, as may be the case if you have refined your objective or audiences. You will need to research whether this additional data is available.

Here are some examples of the types of information used to determine baselines:

- Audience knowledge of and attitudes toward your organization and/or issue
- Common misconceptions and misinformation about your issue
- Audience values that directly affect your issue
- An analysis of organizations, issues or messages that could compete for your audience and media attention
- An analysis of how your issue has been presented or framed in traditional or social media
- A list of 'influentials' who support and oppose your issue

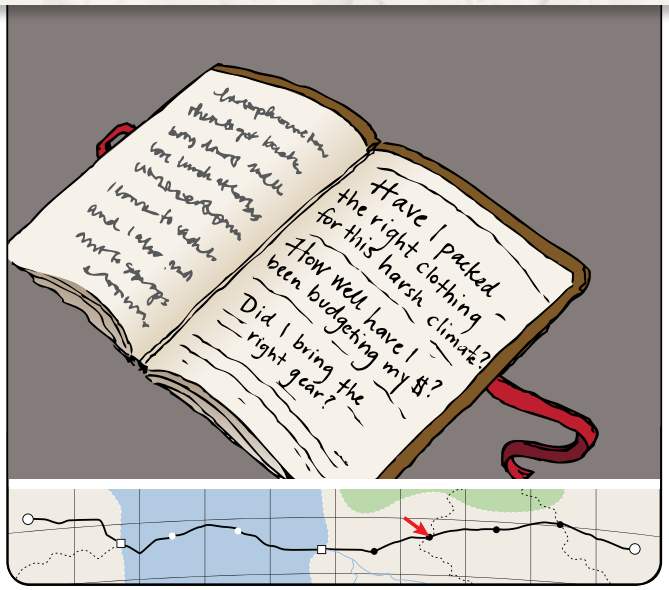
What if I am well into implementing my communication activities and didn't establish a baseline early on?

If you are in the early or middle stages of your communication activities and never collected baseline information, don't worry – it's not too late. It is still possible – and recommended – to establish a baseline now. Look at your goal and objective to decide what information will tell you whether your communications are working, then set about gathering that information. Think of ways to assess conditions prior to your communications in order to establish a retroactive baseline. For instance, you could analyze media coverage from the time before you started your work, or compare records of past membership levels, or web or blog traffic. Feedback or requests that your organization received via email, letters or phone calls can also be helpful in establishing retroactive baselines. Additionally, look for publicly available information such as public opinion surveys, past reports released by peer organizations or interviews given by relevant spokespeople before you started implementation.

Now go to the worksheet and enter what information you need to set your baseline. In Step 8, you will select the evaluation techniques best suited to gathering this data going forward.

6 Pose Your Evaluation Questions

Don't be afraid to ask questions along the way. These questions will help you challenge your assumptions and check on your progress.



Now that you have selected your goal, objective and audiences, and have established a baseline, it's time to formulate the questions that will guide your evaluation. The answers to these questions will reveal strengths and weaknesses in your communication strategy, such as your choice of audiences, messages or tactics. Keep in mind that the more questions you ask, the more work your evaluation will require and the more it will cost. Realizing that you have limited resources, try to pick questions that, when answered, will help you determine whether you are on track toward reaching your objective and long-term goal.

"We need to learn how to prioritize our evaluation questions. Rarely are the resources available to collect data on every aspect of a communications strategy. And such a comprehensive approach usually is unnecessary anyway. Given the choice between collecting a little information on a lot of questions versus collecting deeper information on one or two questions, the latter often is the more useful choice. A 'less is more approach' can be wise when identifying both what to evaluate and how."
—Julia Coffman, Harvard Family Research Project

The kinds of questions you pose will depend on how far you have progressed in your communication activities. To help you tailor your questions to the stage your work is in, we've divided the questions into three categories: early, mid-course and advanced stages. See which questions best apply to where you currently are with your communication initiative.

Early Stages

During the early stages, you are developing your communication plan or starting implementation. You may be working in a relatively new field or in an area in which you have little experience. These situations require some degree of trial and error, as well as an effort to establish a baseline assessment. At this point, an evaluation strategy can help you determine some of the larger strategic directions of your activities and establish a series of milestones to help you reach your intermediate objective and long-term goal.

Examples of communication efforts in the early stages:

- You are launching a campaign to fight childhood obesity by promoting healthier lifestyles. You have connected with potential spokespeople who are willing to be messengers for the importance of healthier nutritional choices and exercise for children.

- You are designing a communication strategy to position your organization as an expert in improving education services for new immigrants in your state. The launch of your first report on the topic has been well-received in the press and among experts.

Sample questions:

- Have I tested my messages with a sample group that is representative of my audience? Has their reaction matched or exceeded my expectations? What adjustments do the responses tell me that I need to make?

- What is the audience's initial response to my spokespeople? Are these spokespeople the right messengers? Do I need to make adjustments?

- Where have my messages first appeared? Local press? Websites? Word of mouth? Are these the outlets I was aiming for? Could a different outlet be a better one for my messages?

- Are my messages and messengers suited for the communication channels that I selected?

- How is the audience responding to my choice of communication tactics (for example, a YouTube video about your organization)? Do I need to make adjustments?

- What evidence do I have that my messages are being absorbed by my audience?

Mid-Course

If you are mid-course in your communication activities, you probably have established a baseline, identified the major players and chosen to invest in certain strategies and tactics. At this point, your evaluation questions can help you determine whether you are on track for achieving your objectives. The answers you receive may lead you to make course corrections or even revisit the original objectives you established. This is the time to learn from what you have achieved so far, to separate what has worked and what has not and to further hone your communications.

Examples of communication efforts in the mid-course stages:

- Your program to develop healthier lifestyles for children in suburban communities is generating substantial news coverage and has succeeded in getting parents to walk their children to school. However, the initial excitement has dissipated after the first year, and most parents have gone back to driving their kids to school.

- After three years of working on education issues for new immigrants, your organization has earned recognition from peers, the educational community and policymakers. Yet the media rarely consult your reports or seek your opinion when covering the topic, and coverage continues to portray the issue negatively.

Sample questions:

- Is my audience more informed about the issue? What evidence do I have? If this information is not publicly available, how else can I obtain it?

- Is my audience more engaged with the issue? If not, does my data indicate possible reasons for the low engagement?

- Based on audience response, do I need to change my audience?

- Based on audience response, do I need to make changes in my messages or messengers?

- Has media coverage of the issue or debate changed since I started working on it? If so, is the change favorable to my objective?

- Are my messages gaining visibility in the media I have targeted? If not, what can I do to bring more visibility?

- Did I target the right media outlets for the objectives I am pursuing? If not, what outlets should I be targeting?

- Have there been unexpected events, news or societal shifts that may affect my progress? If so, do these changes require that I make adjustments to my objectives or communication tactics?

- Can I make a valid claim of having contributed to the changes I observe on my issue? How? If this information is not publicly available, how else can I obtain it?

Advanced Stages

In the advanced stages of a communication effort, you have been working on an issue for a significant period of time and have probably made several positive, measurable steps toward reaching your goal. At the same time, there may be new challenges that you could not have anticipated during earlier stages. You might need to expand your audiences or even focus on new ones. Or you may need to consider new tactics, partners, adversaries or changes in your general environment. At this point, evaluation provides an opportunity to assess what results you have achieved so far and the lessons learned, as well as sharpen your goals and lay out a path for the future.

Examples of communication efforts in the advanced stages:

- Over the last few years, you have made substantial contributions to promoting healthier lifestyles for children and their families. Recently, a new player has entered the scene: a prominent organization has just announced that it will focus on fighting childhood obesity. Because of its high profile, this organization is likely to rapidly gain more visibility than yours. You are weighing your options for how to continue garnering support for your work on this issue.

- You are well-established in the field of education services for new immigrants. You have observed some results in increased access to education for this population, and you believe that these results are significantly due to your work over the past several years.

Sample questions:

- Have my messages become more widely accepted than opposing or competing messages in the media?
- Have my messages become part of the public discourse? What evidence do I have?
- Are there any observable policy results? Can I make a plausible case for having contributed to these results? If this information is not publicly available, how else can I obtain it?
- Are there signs of change in behavioral intention or behavior change? Can I make a plausible case for having contributed to these results?
- Do I have reliable data that can help me make the case for continued support to my activities?
- Does my data indicate a need to change my communication strategy or tactics at this advanced stage?
- Have I achieved my objective and goal? If so, does my organization have a role going forward?
- What lessons have I learned? Have I documented them?
- With whom do I plan to share my lessons learned: Colleagues within my organization? My board? Peers? Funders (or grantees)?

It's important to recognize that some questions may be easier to obtain answers for than others. If you are working on a sensitive or controversial topic that your audience may not be comfortable discussing – such as teen pregnancy – it may be difficult to get the information you are looking for. This can be addressed to some extent by reassuring members of your audience that their feedback will be treated confidentially, or by using information gathering methods that do not reveal their identity (an anonymous online survey, for example). But you may also need to account for times when audience members conceal values or refuse to participate. To find the answers to your questions, you may need to rely on multiple sources of information and/or using more than one evaluation technique.

Now go to the worksheet and enter the questions you have selected. Try to limit yourself to five questions. The next sections will help you obtain answers by guiding you through drafting concrete measurements of progress and choosing evaluation techniques.

EVALUATION IN ACTION

Education Reform from Nuts to Soup

"We looked at how education advocate grantees were communicating and whether or not what they were communicating created value for the program. For example, with the California K-12 Program, grantees were using the phrase 'adequacy movement' to describe their push for 'equitable and adequate funding to provide every child with a quality education, regardless of school district.' While the term 'adequacy' was understood by the grantees to mean more and more equitable funding, the term meant something else to parents and the engaged public – a call for uniformly adequate education. The public didn't want 'adequate' education; they wanted 'excellent' education. There was clearly a language problem that necessitated the grantees moving away from their jargon to language that was more connective with outside stakeholders whose support they needed for success.

"We used values-based research among all stakeholder groups to develop a message framework that helped advocates focus on what they need to talk about, and what they didn't. We aligned what grantees valued with what policymakers valued and then aligned the message to the most commonly held value among parents – education that would prepare children to become successful adults.

"The important thing is to align stakeholders around a common value and constantly communicate the valued outcome – focus on the outcome. The details fall into place once you have everyone tuned into the guiding principle."
—Rich Neimand, President/Creative Director, Neimand Collaborative (in reference to an evaluation of the messaging being used by the Hewlett Foundation's California K-12 Public Education Grantees)

7 Draft Your Measurements

How do you know if you're headed in the right direction? There are signs that will help you determine whether course corrections are needed.

You are now clear on what your communications are expected to achieve. You have defined your goal and objective, identified your evaluation audience, selected information to serve as a baseline and developed a list of questions to be answered. The next step is to draft measurements of progress toward your objective.

"A lot of what you evaluate are really proxies for measures of success. So, for example, raw numbers of media mentions are not particularly useful. While it's gratifying to go from 400 to 1,400 mentions, if those placements are not in publications read by your target audience, this result doesn't say much. But tracking placements in key outlets that are important voices in shaping the policy debate, that is a more meaningful measure to us."
—Barry Scholl, Vice President for Communications and Publishing, The Commonwealth Fund

Mark your milestones

Milestones are "progress checkpoints" that take you from your baseline to your objective. For example, if your objective is to "position the foundation's report on the state of education as a critical resource for policymakers, government agencies and NGOs by the end of year one," then a milestone could be "by the end of month six, policymakers who have attended the report briefings are quoted using data from the report." You will measure the milestone by monitoring and collecting newspaper articles or speeches in which policymakers are citing the report. You should aim to draft about three milestones per objective.

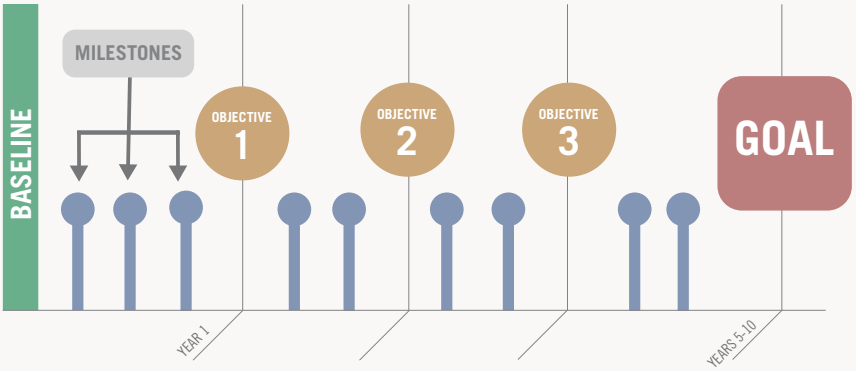


Figure 4. Milestones are checkpoints that show progress from the baseline toward your objective.

How to develop meaningful milestones

1. With your baseline, objective and evaluation questions in mind, ask yourself, "What kind of *intermediate results* would demonstrate progress from my baseline to my objective? What will tell me along the way whether I'm on track?" Write down your ideas.

2. Review the milestones by asking yourself:
   - Do they represent meaningful signs of progress?
   - Are they stated as results?
   - Are they realistically measurable? How?
   - Can I assign a deadline by which they should be reached?
   - Do they help me answer my evaluation questions?

3. Share your milestones with colleagues and see whether they agree with your choices.

"Meaningful milestones do not mean setting the easiest measures possible. The milestones should represent the ambitiousness of your undertaking, make the organization stretch to achieve them, and, most important, serve as an inspiration to succeed – not serve as a threat of possible failure." —Kristen Grimm, President, Spitfire Strategies

Keep in mind that milestones are *not* measures of your activities. Rather, they are the preliminary achievements resulting from your communications. This is an important distinction. Say you have distributed 1,000 copies of a publication; this is an *activity* (also called an output). The milestone that you want to measure is *the response* you expect from the readers – a certain percentage of them wrote to request more information or subscribed to your quarterly e-newsletter (the outcome of your communications). You want to track the outcomes, not the outputs.

How to measure your milestones

Look for simple measures that show whether you are reaching your milestones. For example, say your milestone is "a 50 percent increase in the visibility of the term 'undocumented immigrant' instead of 'illegal immigrant' in the media within six months." You would first need to measure the number of times the respective terms are used in the media at the beginning of your activities; this is your baseline. Then you need to measure the number of times that the preferred term was used by the media after six months of your communication activities, and compare that number to your baseline.

A measure can be *quantitative* or *qualitative*. While *quantitative* measures provide a numerical measure of your communications results, *qualitative* measures reveal more about their effects. For example, the number of newspaper articles mentioning your organization is a quantitative measure, while the content (positive or negative tone or framing of the issue) of the articles is a qualitative measure. Qualitative measures are often more helpful in determining what is working and what can be improved. Sometimes you may choose a combination of quantitative and qualitative measures. For example, if you are evaluating audience awareness of your organization's work, knowing what percentage of your audience has heard of your organization – a quantitative measure – tells only part of the story. Discovering that they can also identify at least one issue that your organization is working on – a qualitative measure – provides a more meaningful indication of increased awareness.

Identify one to three measures per milestone. Remember: your work will quickly become overwhelming if you are tracking too much data, so be strategic in choosing the measures that will best show whether you are reaching your milestone.

How to develop sound measurements

1. Review each milestone. Ask yourself, "How can I *concretely* measure progress on this milestone? Is it a quantitative or a qualitative measure?" Write down your ideas.

2. Review the measures and eliminate the ones that are least relevant to your milestone or impossible to measure.

3. Share your measures with colleagues and discuss whether they agree with your choices.

How do I collect data that will show whether I've achieved my milestones?

There are many tools at your disposal to help you collect the data you need: website analytic services, online surveys and polls, news databases and so on. But don't be tempted by easy measures. Quantitative measures that count emails sent, reports downloaded or media hits garnered can be informative, but these measures may not be as useful as looking at some qualitative measures. What actions resulted from the emails sent? When users downloaded a publication from your site, what did they do with it? How was your organization characterized when it was mentioned in newspaper articles? Step 8 will help you select the right tools for collecting the data you need.

What if I find I'm going in the wrong direction?

If the data shows positive results, you are on the right track. If you have not reached a milestone or if your data is not what you expected, you may need to adjust your communication tactics or even your strategy. Alternatively, you may consider revisiting the milestone. Was it realistic in the given time frame? Is it a good indication of whether you are moving toward your objective? Flexibility is vital to the success of most communications. If, for instance, the visibility of your messages in the media is not increasing at the pace you expected, you may decide to: 1) reallocate resources to the outreach tactic that is generating the most placements; 2) start reaching out to different media targets; or 3) extend the deadline of your milestone and continue to closely monitor progress. The important thing is to not lose track of your objective. The process of mid-course adjustments is a learning experience – the more you do it, the better you will get at it.

"As the adage warns, if you find yourself in a hole, the first thing to do is stop digging. So too when a mid-course evaluation shows that your campaign is heading off track. It is never too late to tweak your tactics and make needed adjustments in strategy. In fact, it is the only responsible thing to do. Often, the difference between failure and success might be as simple as recasting the message, utilizing new spokespersons or targeting a different segment of your audience. But if you keep shoveling dirt when that hole is getting deeper, you'll eventually dig your own grave." —David Brotherton, Brotherton Strategies

Examples of Objectives, Milestones and Measures

Objective Secure the support of a senior member of the Senate Foreign Operations Committee to increase funding for combating malaria by the end of year one.

Milestone By the end of month six, receive an invitation to meet with a senior member after sending a policy briefing on combating malaria to his or her office.

Qualitative measures

- You have made contacts in the senior member's office
- You have obtained sample briefs from the member's office to better tailor your brief to their commonly used formats

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Objective Position your organization as a credible source of information on childhood obesity with key media outlets by the end of year two.

Milestone Establish a relationship with journalists from key media outlets by the end of year one.

Quantitative/qualitative measures

- Communication exchanges indicate increased interest by journalists
- Organization's spokesperson is quoted at least twice in key media outlets
- Organization's blog is referenced in at least one key media outlet

Now go to the worksheet and enter your milestones and the measures you will use to track them.

8 Select Your Evaluation Techniques

The right tools will help you find your way. Each journey is unique; decide which tools are right for you.

It's time to choose the techniques you will use to collect data to establish your baseline and track your milestones. Keep in mind that the techniques you pick will also impact your evaluation costs. Depending on the resources you have available for the evaluation, you may choose techniques that are less costly or that can help you monitor several milestones at once. You should also note that some of these techniques may require working with professional evaluators or training your staff to ensure proper application and accurate data interpretation.

Some common evaluation techniques include:

Interviews Interviewing consists of selecting a handful of individuals who represent the base of your audience and asking targeted yet open-ended questions. This will allow you to receive better insight into how people are responding to your communication activities.
When to use At any stage of planning or implementation. For example, you are about to draft a new institutional communication plan, but first you want to know how your key stakeholders and audiences view your organization and its leadership, contributions, successes and failures. Interviews with representative constituents will give you insight into these areas.

Focus Groups You may want to bring together a group of people from your audience to test new messages or have a directed group discussion about your communication activities. Unlike interviews, focus groups are moderated by a facilitator and allow people to bounce ideas off one another, building a richer set of data. There are professionals who specialize in conducting focus groups who can help you design one or more sessions tailored to your needs, as well as to analyze the results.
When to use During planning, early implementation or when you are ready to advance to a new phase of your communication efforts. Focus groups are also especially useful when you want to test a specific message, tactic or approach. For instance, you are planning a three-year campaign to generate support for medical treatment for children living with HIV/AIDS. You have come up with two different creative approaches and are not sure which one would better speak to your audience.

Surveys – Online and In-Person Using simple and inexpensive technology, you can administer an online survey consisting primarily of multiple-choice questions. While you may be able to ask some open-ended questions, surveys are best for "checkbox" answers that garner quantitative data. Surveys can also be administered in person, allowing you to also observe the respondent and gather additional data based on his or her reactions to the questions. There are several tactics for selecting participants for surveys:

- **Pre-determined population** (for example, a group of 10 policymakers)
- **Sample from the general public** (for instance, random users who enter your website or phone calls to people living in a particular congressional district)
- **Snowball sampling** As you survey one person, you ask if he or she knows someone else to survey (for example, you are conducting a phone survey about endangered species; you would ask a respondent if they know a friend who would be interested in taking the survey)
- **Intercept survey** "Intercepting" members of your audience at a particular location appropriate to your communication activities and surveying them on the spot (for example, asking shoppers at the seafood counter of a local grocery store about sustainable seafood choices)

When to use In the planning stages and during implementation. Surveys are useful for categorizing and comparing data at a given point in time as well as over a period of time. For this reason, they can be very helpful in establishing baselines as well as for monitoring progress. However, keep in mind that you may secure higher response rates and more revealing data once your audience has developed a connection to your organization. For example, you have hosted a series of monthly webinars over the last year that have attracted 250 participants. You want to learn more about their motives for participating and how they are using the information, as well as what has been less useful. A survey of these participants will help you to design and improve future webinars, engage and retain attendees' interest and attract new participants.

Observation You may want to observe individuals or groups to see how they are responding to certain messages. This is particularly useful with communication initiatives that involve participatory discussions, public forums and debates.
When to use During implementation. For instance, your organization offers a training program on environmental issues for high school students. After the training, the students are expected to return to their schools and conduct their own awareness campaigns. You are interested in learning more about how the students are doing back in school, and whether the messages they are using are effectively reaching their peers. A trained observer could visit a sample of schools and witness how the students organize their peers to take action on Earth Day.

Quantitative Data Collection Websites, blogs and other social networks allow you to collect useful data. For instance, on a website, you can track the number of daily or monthly visitors and page views. For blogs and social networks, you can track number of subscribers and number of comments left by visitors. Additionally, you can refer to online services that rank blogs' popularity and use these ratings to compare your blog to others in the field.
When to use At any stage of planning or implementation. You want to know if your readership is growing or whether the number of comments is rising.

Quantitative Data Analysis While it may sound daunting, you can use the data collected from web tracking or media monitoring services to conduct statistical analysis of the possible relationships between your communication activities and external changes.
When to use During planning and at any stage of implementation. For example, after six months of launching your blog, you want to test whether there is a connection between increase in comments and the ranking of your blog. Does the number of weekly posts relate to the frequency in which your blog is referenced by others? Statistical analysis can explore these relationships.

Content Analysis To assess the quality and tone of your media coverage, or to review the content of specific programming that reaches your audience, this technique can provide powerful insights. However, the process is often time-consuming and the people carrying out the analysis need to be well-trained in the technique to ensure objectivity and consistency.
When to use Early stages and throughout implementation. For example, media coverage for your issue has increased, but you sense that negative coverage is dominating the air and radio waves. You want to find out if this is the case, so you turn to content analysis.

This list of various evaluation techniques is not comprehensive, but something to get you started. For more information on measurement tools, see the Appendix: Useful Resources for Communications Evaluation.

Now go to the worksheet and select which evaluation technique is best suited to establishing your baseline, answering your questions and tracking each of your milestones and measurements. As always, discuss with your colleagues and see if they agree with the techniques selected.

9 Estimate Your Budget

Your budget will determine how you go about your journey. Keeping it in mind will ensure that you get from start to finish.

After you have selected your evaluation techniques, it's time to estimate your budget. A rule of thumb is that the evaluation budget should be at least five to seven percent of the total budget of your communication program. This is a generalization and of course will vary, but the cost should not dip below this level.

The main budget items to consider are:

Staff time Full-time staff, interns and volunteers. Identify the evaluation tasks that can be conducted internally, and estimate the time that will be required of each individual.

External consultant fees Evaluation experts, facilitators, phone and field interviewers, etc. Explore the possibility of working with trained evaluators experienced in the type of evaluation you are interested in. Ask them to provide an estimated budget. If your resources are very limited, consider contacting graduate students who have sound expertise in evaluation.

Cost of selected evaluation techniques Note that several of the techniques we mention in this guide are often available at no cost, such as online surveys or web analytics. On the other hand, if you plan to hire a professional firm to conduct focus groups or surveys, obtain an estimated budget.

Travel and incidentals Make sure to include travel costs for both your staff and consultants.

Editing, design, production and dissemination costs We encourage you to document, publish and share your evaluation findings. This will help build the practice of communications evaluation.

As you consider costs of the evaluation, you should also talk about roles and responsibilities. The budgeting process may also help you make decisions about what to prioritize in the evaluation. Over time, as you gain more experience with evaluation, your budget estimates will become more accurate.

Now go to the worksheet and draft your budget in the space provided.

"The evaluation has to recognize the size, the scope and the maturity of the [communications] campaign. Policy change takes years or decades to happen. Most organizations lack funding to do evaluations over that period of time. You must recognize that when you are coming into it. What is the scope – is this a state, local, regional, national or worldwide campaign? What is the size – is it a $25,000 campaign or a $2.5 million campaign? Expectations have to be commensurate with money available."
—Phil Sparks, Executive Vice President and Co-Founder, Communication Consortium Media Center (CCMC)

Welcome to Your Evaluation Strategy!

Congratulations! If you've followed the steps outlined in this guide, you have successfully crafted your communications evaluation strategy. Your strategy will be the Evaluation Strategy Worksheet that you filled out during each step. Now you'll want to review each entry and fine tune if necessary. Determine whether anything needs to be further revised by sharing the strategy with colleagues and getting their feedback. Review the budget and determine whether you have the resources to monitor the questions, milestones and measures utilizing the techniques you have chosen.

One last piece of advice: communicate your findings!

We strongly encourage you to share what you have learned with others. Who will benefit from what you are learning through your evaluation? Your team? Your board? Your colleagues throughout the organization? Your peers in other nonprofits and foundations? Should you share the same information internally and externally? These are important questions that need to be answered before you share your findings.

In the Appendix, we suggest a web resource where you can publish the findings of your evaluation and read about what others have learned through their own evaluations.

We wish you the best of luck in your endeavor to evaluate your communication efforts and hope that you will share with us the experiences you had when using this tool – what worked, what didn't and what can be done to improve it. Please contact us at info@asibey.com – we value your feedback!

STEP 1. Determine What You Will Evaluate

What are you evaluating? A strategic initiative? A tactical effort? Something else? Be specific.

STEP 2. Define Your Goal

What type of outcome are you pursuing?
What is the change your organization is trying to achieve over five to ten years?

STEP 3. State Your Objective

What is your SMART objective? Run your objective through the SMART test below.
[Note: If you have more than one objective, you need to fill out a separate worksheet for each one.]

OBJECTIVE	SPECIFIC	MEASURABLE	ATTAINABLE	RESULT-FOCUSED	TIME-SPECIFIC

SMART Score (out of 5): _____

Your SMART score should be at least 4. If your score is 3 or less, go back and refine your objective.

STEP 4. Identify Your Audience

Who are the target audiences for your communication activities? Are there any auxiliary audiences who can also provide valuable insight for your evaluation? Write them down below.

Communication Target Audience(s)

1. _____
2. _____
3. _____

Auxiliary Evaluation Audience(s)

1. _____
2. _____
3. _____

STEP 5. Establish Your Baseline

What information do you need to establish your baseline – the starting point against which you will measure your activities?

1. _____
2. _____
3. _____
4. _____

STEP 6: Pose Your Evaluation Questions

What stage is your communication initiative in (check one): __Early __Mid-course __Advanced
Write down your evaluation questions based on that stage:

1. _____
2. _____
3. _____
4. _____
5. _____

STEP 7. Draft Your Measurements

What are the most meaningful milestones that will demonstrate progress toward your objective?
How will you measure them? Remember, you want to track outcomes, not outputs.

OBJECTIVE	Milestone A	Milestone B	Milestone C
	Measures 1. 2. 3.	Measures 1. 2. 3.	Measures 1. 2. 3.

Step 8: Select Your Evaluation Techniques

Select the techniques you will use to measure each item from the blue column on the left. Remember, some techniques can be used to measure more than one item (baseline information, evaluation questions, milestones), so there may be some overlap. Use a separate chart for each objective.

Briefly recap your answers from the worksheet here: ↓	Interviews	Focus Groups	Survey: Online	Survey: In-Person	Observation	Quantitative Data Collection	Quantitative Data Analysis	Content Analysis	Other Technique	Other Technique	Other Technique
Objective											
Baseline Info 1											
Baseline Info 2											
Baseline Info 3											
Baseline Info 4											
Question 1											
Question 2											
Question 3											
Question 4											
Question 5											
Milestone A											
Measure 1											
Measure 2											
Measure 3											
Milestone B											
Measure 1											
Measure 2											
Measure 3											
Milestone C											
Measure 1											
Measure 2											
Measure 3											

Step 9: Estimate Your Budget

Now, based on the techniques you have chosen above, estimate your line items below.
You may enter estimated hours or dollar amounts needed. You will need to convert hours to dollars to get your total.

Budget Line Items:	Interviews	Focus Groups	Survey: Online	Survey: In-Person	Observation	Quantitative Data Collection	Quantitative Data Analysis	Content Analysis	Other Technique	Other Technique	Other Technique
Staff Time											
External Consultant Fees											
Evaluation Technique Cost											
Travel and Incidentals											
Editing, Design,Production and Dissemination Costs											
Other Cost											
Other Cost											
Sub -Total											
GRAND TOTAL	$										

The following resources may be useful to support your evaluation work:

Communication Planning

With a good communication plan, evaluation is much easier and more productive. Consult these resources to help you create a strong communication plan that you can connect to your evaluation strategy.

- **Smart Chart 3.0: An Interactive Tool to Help Nonprofits Make Smart Communications Choices**
  Spitfire Strategies, 2008
  http://www.smartchart.org/
  The Smart Chart is a step-by-step planning tool that helps nonprofits make smart choices and develop high-impact communications strategies.

- **Foundation Communications: The Grantee Perspective**
  Center for Effective Philanthropy, February 2006
  http://www.effectivephilanthropy.org/images/pdfs/CEP_Foundation_Communications.pdf
  This report presents the results of a research study surveying grantees on foundation communications, revealing what types of communications are most important to grantees. It also identifies some of the best practices common to foundations that are highly rated for the clarity of their communications. This report may be useful to read before embarking on any new communication initiatives, as well as to improve existing ones.

Evaluation Methods and Techniques

To learn more about the pros and cons of different evaluation methods and techniques, consult these resources.

- **W.K. Kellogg Foundation Kellogg Evaluation Handbook**
  W.K. Kellogg Foundation, 1998
  http://www.wkkf.org/Pubs/Tools/Evaluation/Pub770.pdf
  This handbook provides a framework for thinking about evaluation as a relevant and useful program tool. It also offers a blueprint for planning, designing and conducting project-level evaluation.

- **Qualitative Research and Evaluation Methods, Edition 3**
  Michael Quinn Patton, Sage Publications, 2002
  This book provides an overview of conceptual elements of qualitative research and concrete steps for designing, collecting and analyzing qualitative data.

- **Introductory Statistics, 8th Edition (a general introduction to quantitative methods)**
  Neil A. Weiss, Addison Wesley, 2007
  For those unfamiliar with statistics, this textbook provides a general overview of simple statistical procedures and guidance on how to use them to inform evaluation.

- **Focus Groups: A practical guide for applied research, 3rd Edition**
  Richard A. Krueger and Mary Anne Casey, Sage Publications, 2000
  This is a practical guide on how to design and conduct focus groups, including developing questions, selecting participants, moderating focus group discussions and analyzing results.

- **Using Online Surveys in Evaluation**
  Valerie M. Sue and Lois A. Ritter, Jossey-Bass and the American Evaluation Association, 2007
  This publication provides a general introduction to the use of online surveys for evaluation purposes, including how to select samples, develop questions for online surveys, conduct an online survey and manage online survey data.

- **Writing a Media Analysis**
  Prepared for the Communications Consortium Media Center by Douglas Gould and Company, October 2004
  http://www.mediaevaluationproject.org/WorkingPaper2.pdf
  This brief report contains specific methodology on how to conduct a media analysis, including spokesperson and framing analysis.

Miscellaneous

The following are some good general resources pertaining to evaluation and organizational effectiveness.

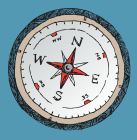
- **Center for Effective Philanthropy**
  www.effectivephilanthropy.org
  The mission of the Center for Effective Philanthropy (CEP) is to provide data and create insight so that philanthropic funders can better define, assess and improve their effectiveness and impact. CEP offers individual foundations the opportunity to assess performance on key dimensions relative to other foundations. Tools include the Grantee Perception Report and the Stakeholder Perception Report.

- **2008 eNonprofit Benchmarks Study:**
  An Analysis of Online Messaging, Fundraising and Advocacy Metrics for Nonprofit Organizations
  M+R Strategic Services and Nonprofit Technology Network, 2008
  http://www.e-benchmarksstudy.com
  This study analyzed online messaging, fundraising and advocacy data from 21 leading nonprofit organizations. It provides new data to aid in establishing benchmarks for email messaging, email list size, online fundraising and online advocacy.

- **Speaking for Themselves: Advocates' Perspectives on Evaluation**
  Innovation Network, September 2008
  http://www.innonet.org/client_docs/File/advocacy/speaking_for_themselves_web_enhanced.pdf
  This report, written as part of the Innovation Network's Advocacy Evaluation Project with support from the Annie E. Casey Foundation and Atlantic Philanthropies, provides information garnered from a survey of 200 participants from across the nonprofit sector to develop practical recommendations for nonprofit staff, evaluators and funders on how to evaluate advocacy efforts.

- **When and How to Use External Evaluators**
  Tracey A. Rutnik of the Association of Baltimore Area Grantmakers
  and Marty Campbell of The James Irvine Foundation, 2002
  http://www.irvine.org/assets/pdf/evaluation/when_how_external_evaluator.pdf
  This brief paper is intended to serve as a resource to program officers to inform decisions about their allocation of resources and use of external consultants for program evaluations.

- **IssueLab**
  www.issuelab.org
  IssueLab is an online publishing forum for nonprofit research whose mission is to more effectively archive, distribute and promote the extensive and diverse body of work being produced by the third sector. To review evaluation reports published by peer organizations, access relevant publications on evaluation or post your own evaluation reports, visit the IssueLab website.



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